3. Africa's trade arrangements with the European Union and China

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Having focused on regional trade issues close to home on the continent in the previous chapter, this book's metaphorical zoom lens scans out in this chapter to consider bilateral trade developments with Africa's two most economically significant trading partners. These are the EU and China, which together account for a little under half of both Africa's exports and imports. As geographical neighbours, Europe and Africa have a long trade history, while China is a relative newcomer to trading with Africa. Aside from this obvious point of contrast, Africa's trade arrangements with the EU and China cannot be more different. Specifically, while the EU has established an explicit policy structure for its trade relations with Africa, only a loose policy framework is in place to guide trade and investment flows between China and African countries. In this chapter, we show that, from a pro-development perspective, there is scope for improvement in both the EU's and China's trade offers to Africa.

3.1 Africa–EU trade

Formal compacts for trade and economic cooperation between Europe and Africa can be traced back to the early years of economic integration in Europe and the independence era in Africa. From the 1960s, the cooperation was formally codified in successive agreements in the form of the Yaoundé, Lomé and Cotonou Conventions and in similar country-specific pacts with North African countries. These covered development assistance, finance and trade. From the start, European trade policy established a clear division between Africa north and south of the Sahara, with separate market access concessions to the countries in these configurations. The lofty objectives of trade coopera-

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tion included diversification from commodity dependence. However, in over 60 years of preferential trade arrangements, the structure of trade between the two continents has hardly changed. Morocco, Egypt, Tunisia and South Africa are partial exceptions (see Chapter 1) and, in each case, more diversified trade is the outcome of significant European investment in non-extractive sectors. With a colonial legacy of little intra-African trade along with weak infrastructure to connect African countries, and against the reality of nearby Europe as a dominant, stable and mature market, preferential trade between Europe and its former African colonies locked in a powerful incentive to maintain the status quo. It is a status quo that is contested by the rapid rise of China as a competitor to Europe in Africa and the Chinese approach of combining trade with financing for infrastructure development and forays into manufacturing.

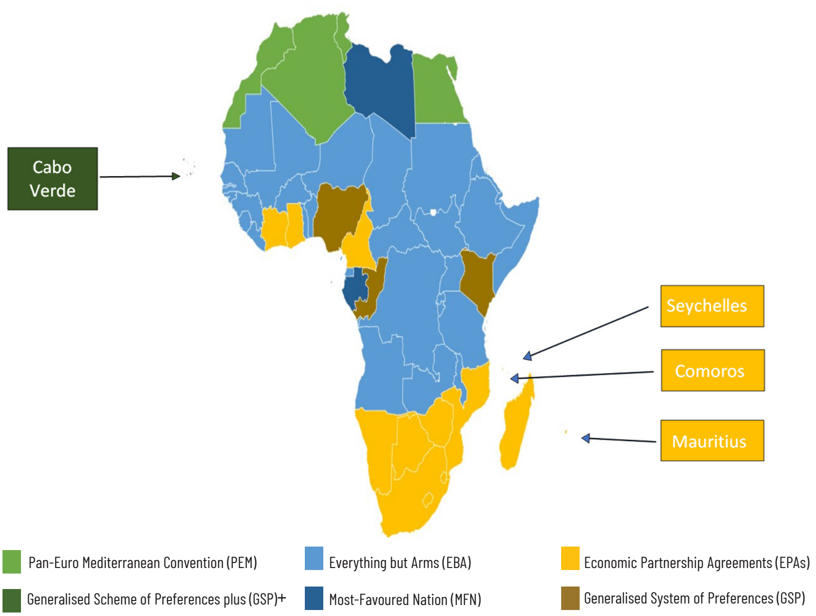
Fast-forward to 2021, when the European Union took three important steps that will shape its trade relations for the foreseeable future. First, it announced a new Open, Sustainable and Assertive Trade Policy (European Commission 2021a) to reaffirm European trade principles and reset its trade ambitions. This followed the unilateralism of the Trump years, the systemic traumas of Brexit, and a changing geopolitical landscape. Second, it concluded additional negotiations with sub-Saharan countries and other ex-colonies in the Caribbean and Pacific for a Post-Cotonou Agreement. Third, it launched a Global Gateway Initiative as a strategic plan for investment in infrastructure with digitalisation, climate and energy, transport, health, education and research as related priority areas to counter China's rising geopolitical influence and its Belt and Road Initiative. This section reviews these developments and implications for the EU–Africa trade relationship in relation to the analytical framework outlined in Chapter 1. The section begins with an outline of the trade regimes under which Africa trades with the EU.

The EU trade regimes

Figure 3.1 provides a map of the different arrangements governing trade relations between the EU and Africa. The arrangements are based on geography (such as whether the African country is in North Africa or below the Sahara), level of development (whether it is a least-developed or a developing country) or whether the country has opted out of any arrangement with the EU and trades under the general WTO baseline (most favoured nation, MFN) terms. This translates into five preferential schemes alongside MFN:

- **Everything but Arms (EBA):** applicable to 33 least-developed countries (LDCs), providing duty-free, quota-free market for their exports to the EU on a unilateral basis.
- **Economic Partnership Agreements (EPAs):** applicable to 14 countries in five different regional blocs, which are generally not consistent with the membership of the established regional economic communities.

Figure 3.1: EU trade regimes by African country



Source: Authors' compilation.

The EPAs are reciprocal but include asymmetrical aspects that accord a small degree of special differential treatment to participating African countries.

- **Generalised System of Preferences (GSP)-Plus:** a scheme valid until 2023 applicable to the Cabo Verde islands on Africa's north-west coast, which, as a recently graduated LDC, is not eligible for EBA. The market access arrangements are like EBA but require the beneficiary country to implement international human rights, labour and environmental conventions.
- **GSP:** applicable to the Republic of Congo, Kenya and Nigeria and provides for full or partial removal of customs duties on two-thirds of tariff lines on products within the EU market.
- **Euro-Mediterranean Association Agreements:** country-specific and applying to Algeria, Egypt, Morocco and Tunisia. Like the EPAs, they are reciprocal, semi-asymmetrical free trade area agreements.
- **Most-Favoured Nation (MFN) (WTO terms):** applying to Libya and Gabon.

The rules of origin underpinning market access for trade in goods are moderate but differing under the preferential arrangements. For instance, the EU grants more liberal rules of origin in the textile and apparel sector to countries that are trading under interim or regional EPAs. Most EU agreements do not grant 'cumulation', in which the value from inputs of other African countries embedded in a good would be considered to originate under the agreement. This is a disincentive for fostering export value chains between countries confined to different trade regimes.

The stringent provisions of the EU's food safety (sanitary and phytosanitary) measures are known to limit gains for African agricultural and fisheries exports to the European market. For example, African exports to the EU in the fish and beef sectors have fallen following compulsory regulations that are expensive to fulfil. Regulations to prevent bovine spongiform encephalopathy (BSE) are being applied to African countries in which BSE has never been diagnosed (Luke and Suominen 2019). Moreover, the EU's hotchpotch arrangements in the different trade regimes are detrimental to Africa's integration efforts since they result in hard borders for EU trade between several African countries. This is discussed in the section 'Assessing the EU-Africa trade arrangements'.

Open, sustainable and assertive trade policy

On 18 February 2021, the European Commission published the communication 'Trade Policy Review: An Open, Sustainable and Assertive Trade Policy'. This policy articulation, prepared at the height of the pandemic, elaborates current and continuing evolutions in the EU's trade policy, many aspects of which have important implications for African countries. The 'open and sustainable' component instrumentalises trade policy to contribute to a green deal and a digital transformation of the EU economy over the next decade. The 'assertive' aspect speaks to a 'geopolitical EU' that desires to chart its own course on the global stage, exercising leadership and engagement to safeguard a multilateral rules-based trading order centred on the WTO while assertively defending its interests and values. The EU is styled as a 'global economic power' with a responsibility to champion multilateral cooperation in line with the openness and attractiveness of its single market and its active trade with partners around the world.

Openness and engagement are described as a 'strategic choice' that lead to more prosperity, competitiveness and dynamism. The policy commits the EU to collaborate with partners to advance a positive agenda on economic recovery from the pandemic, green growth and digitalisation but to 'work autonomously when it must'. While the war in Ukraine has renewed the Western Alliance, which was fractured by the abrasive policies of the Trump administration, it is also clear that, despite the demonstrable interest of the Biden administration in strengthening the transatlantic relationship, the intent of the document was to put a marker down that the EU is an independent actor and will behave as such when necessary.

The policy established six medium-term priorities as follows:

1. Reforming the WTO
2. Supporting the green transition and promoting responsible and sustainable value chains

AFRICA'S TRADE ARRANGEMENTS WITH THE EUROPEAN UNION AND CHINA 55

3. Promoting the digital transition and trade in services
4. Strengthening the EU's regulatory impact
5. Deepening the EU's partnerships with neighbouring, enlargement countries and Africa
6. Reinforcing the EU's focus on implementing and enforcing trade agreements and ensuring a level playing field for EU businesses

For Africa, which is specifically referenced in the document, two distinct facets of the new policy stand out. First, for the first time, the EU made sustainability an explicit and central pillar of its trade policy. This implies a commitment to leverage the EU's global power and strong trade relationships to support sustainable and fair trade as well as to increase the ambition of its trading partners to address climate change. This is both an opportunity and a challenge for Africa. The opportunity is that a new focus on sustainable and fair trade is consistent with Africa's industrial development ambitions for capturing and retaining more value from commodities along the supply chain. If this is backed by the approach that the EU rolled out in its Global Gateway Initiative (discussed below), it could help to foster economic diversification and inclusive growth. The challenge, however, is that the EU could pivot towards protectionism by introducing new measures and tariffs such as the already announced carbon border adjustment mechanism (European Commission 2019). This is aimed at avoiding the risk of carbon leakage in certain sectors with a high carbon emission intensity where the EU increases its climate ambition and partners do not. Unfortunately, Africa, which bears little responsibility for the climate crisis, could find its exports from these sectors penalised in the EU market.

The second facet of the new policy is recognition that most future growth will take place outside the EU and trade plays a key role in connecting Europe to these high growth regions. Africa is viewed as one of these regions. Recognising the problematic effects that are reinforced by its own fragmented trade regimes in Africa, the policy points to a continent-to-continent trade agreement as a solution, not for the immediate future but as a long-term prospect. In the meantime, the EU plans to 'widen and deepen' the EPAs and Euro-Mediterranean Agreements to tap into the robust growth that is expected. This is in line with another priority of the policy, which is to 'implement and enforce trade' existing agreements. With respect to these Africa agreements, this means in effect that the EU wants to enforce the rendezvous clauses embedded in many of them for adding investment, services, intellectual property rights and government procurement, among others.

As already noted, the EU's fragmented approach and the different trade regimes are detrimental to Africa's trade integration efforts. This led Concord, the European NGO Confederation for Relief and Development, to ask:

> Where does this leave the African Continental Free Trade Area and the continent-to-continent approach and where does it leave the local and regional attempts to strengthen intra-African

> trade.… It is crucial that the EU allows [the] countries to make their own assessments as to when they would be ready to negotiate such issues with the EU and that the EU does not pressure them to prematurely take up far-reaching liberalisation commitments for which they are not ready. Triggering the rendezvous clauses and broadening and deepening the [agreements] would also mean that the … countries involved would drift further away from the other countries in their regions. The EU's offensive interests in Africa should not prevail over the development needs of African countries. (Concord, European NGO Confederation for Relief and Development 2021)

The other priorities identified in the Open, Sustainable and Assertive Trade Policy communication complete the EU's 'positive agenda' for engaging with its trading partners. These are WTO reform, updated rules for the digital economy including digital delivery of trade in services, and maintaining leadership in global regulatory cooperation.

The Post-Cotonou Agreement

The latest in the series of trade, development, finance and governance compacts with sub-Saharan countries was initialled on 15 April 2021 as part of an overall agreement between the EU and the Organisation of African, Caribbean and Pacific States (OACPS). Known as the Post-Cotonou Agreement (PCA), it establishes a development cooperation framework between the EU and the ex-colonies for the next two decades. What is striking about the agreement is the relative marginalisation of core trade policy issues, the EU having taken the view that its trade regimes with these countries were already well established in initiatives like the EPAs. Accordingly, the negotiations on behalf of the EU were led by the Directorate for International Partnerships, not the Directorate for Trade. As such the focus was on a broader set of issues on which there was already broad consensus, such as economic growth, climate change, mobility and migration, business environment, and private sector support. Multilateral commitments in the UN Agenda 2030, its UN Sustainable Development Goals and the Paris Agreement are the main frame of reference. With this broad focus, the agreement reads like a manual for economic development, unlike previous iterations of compacts between the EU and the same group of countries, which centred on trade. The agreement took over 30 months to negotiate. This relatively long period can be explained both by the Covid-19 pandemic, which led to repeated postponement of face-to-face negotiations, which were eventually replaced by virtual formats, and resistance from some OACPS countries to some aspects of a good governance agenda that the EU put on the table. These concerned human and sexual rights and the death penalty, which predictably revealed disagreements (Ishmael 2021).

The PCA has four main parts: an umbrella agreement with general objectives and principles and three region-specific protocols for each of the three regional parties: Africa, the Caribbean and the Pacific. The umbrella agreement addresses trade in broad and hortatory terms in relation to the positive benefits of trade and sustainability, trade in services, trade facilitation, business environment, investment, and private sector development. It calls for a 'high level of environmental, social and labour protection' in their trade relations and developing low-carbon productive capacities. It reaffirms the desire of the parties to 'build on their existing preferential trade arrangements and Economic Partnership Agreements (EPAs) as instruments of their trade cooperation' and 'broadening the scope of EPAs and encouraging the accession of new Member States'.

The Africa Protocol commits the parties to 'support … the implementation of the African Continental Free Trade Area' while also claiming that:

> the implementation of EPAs, the African Continental Free Trade Area and other applicable trade agreements are complementary and mutually supportive while contributing to the deepening of the regional and continental integration process as part of the AU's trade and structural transformation agenda.

Cooperation at the WTO is highlighted but there is no mention of unlocking the Doha Round impasse including support for African priorities such as trade distortions in agriculture (for more on which see Chapter 5). While the principle of special and differential treatment for developing countries in relation to WTO rules is recognised, it is considered only in the areas in which there is already consensus at the WTO, such as cooperation to ensure clarity in sanitary, phytosanitary and other standards and compliance with trade facilitation commitments.

Prominence is also given to business environment reforms, barriers to trade, non-tariff measures and reducing trade costs. For example, under Article 10 on Business Environment and Investment Climate, the PCA states that:

> parties shall improve national and regional regulatory frameworks and simplify business regulations and processes, reduce and streamline administrative formalities, reinforce cooperation and build capacities to implement effective competition policies. They shall adopt open, transparent, and clear regulatory frameworks for business and investment, with protection for property rights.

Under the same article, the parties agreed to support financial sector reforms through measures that promote the improvement of access to finance and financial services, especially for micro, small and medium-sized enterprises (MSMEs), the development and interconnectivity of financial markets, and the integration of capital markets to ensure the efficient allocation of savings to productive investment and the private sector. They agreed to foster competition between financial service providers, to develop viable banking and non-banking financial sectors and to strengthen mobile and digital financial services in view of increasing access to finance, especially for MSMEs. The agreement recognises African industrial development aspirations, noting in Article 14 that:

> the parties shall promote the transformation of African economies and their transition from commodity dependence to diversified economies through the local treatment and processing of raw materials, added-value manufacturing and integration into regional and global value chains.

In Article 21 the parties commit to support efforts to increase trade in manufactured goods through linkages to markets and trade facilitation, including for enhanced quality standards and infrastructure. Article 13 on investment commits the parties to:

> undertake to work jointly to unlock sustainable and responsible investment from domestic and foreign, public and private sources. They shall pay particular attention to sectors that are essential for economic development, have high potential for sustainable job creation particularly in value-adding sectors and foster environmental sustainability.

The reforms that are proposed are in line with Africa's industrial development aspirations and can help to drive diversification and ramp up exports. But the agreement contains no specific commitments on investment flows, which is perhaps the most critical factor for driving economic transformation. The Global Gateway Initiative provides for a financial envelope to support the agenda outlined in the PCA and its Africa Protocol. But this, too, is vague on actual commitments.

The EU Global Gateway Initiative

The EU Global Gateway Initiative (European Commission 2021b) was launched on 1 December 2021 as the EU's financial offer to support economic development around the world. It can be seen as the EU's answer to back its claim to be a global economic power and autonomous actor on the world stage and its response to China's Belt and Road Initiative. The Global Gateway differentiates itself from the Belt and Road Initiative as being underpinned by European values and multilateral policy frameworks. This was made clear by the president of the European Commission at the launch of the initiative:

> COVID-19 has shown how interconnected the world we live in is. As part of our global recovery, we want to redesign how we connect

> the world to build forward better. The European model is about investing in both hard and soft infrastructure, in sustainable investments in digital, climate and energy, transport, health, education and research, as well as in an enabling environment guaranteeing a level playing field. We will support smart investments in quality infrastructure, respecting the highest social and environmental standards, in line with the EU's democratic values and international norms and standards. The Global Gateway Strategy is a template for how Europe can build more resilient connections with the world. (European Commission 2021c)

The financial model is based on the tools in the EU multi-annual financial framework 2021–2027 for budgetary allocations over this period. Over €300 billion has been pledged during the six years to 2027 from the EU's budget and planned investment by European financial and development finance institutions such as the European Investment Bank and the European Bank for Reconstruction and Development. This suggests a repacking of existing instruments rather than new EU development financing. Some of this support will go through a new institution, the European Export Credit Facility. Having observed the approach taken by China's state-backed financial institutions, the new facility:

> would help ensure a greater level playing field for EU businesses in third country markets, where they increasingly have to compete with foreign competitors that receive large support from their governments, and thus facilitate their participation in infrastructure projects. (European Commission 2021b)

The delivery model is what is described as 'Team Europe':

> The Global Gateway will bring together the EU, Member States with their financial and development institutions, including the European Investment Bank (EIB), and the European Bank for Reconstruction and Development (EBRD) and seek to mobilise the private sector in order to leverage investments for a transformational impact. The EU Delegations around the world, working with Team Europe on the ground, will play a key role to identify and coordinate Global Gateway projects in partner countries.

Half of the amount pledged for the Global Gateway (€150 billion) is earmarked for Africa, according to announcements made at an EU–AU summit in February 2022 (see Box 3.1). It is noteworthy that trade was conspicuously absent from the seven clusters of the summit agenda. How the Global Gateway funds will be accessed and disbursed remains unclear and the impact that the initiative will make on the ground remains to be seen.

Box 3.1: 2022 EU–AU Summit

In February 2022, the EU hosted the sixth EU–AU summit with the objective of forging a common vision for a renewed partnership in building back from the pandemic. Forty African leaders and the 27 EU leaders attended. The agenda had seven clusters as follows: financing sustainable and inclusive growth; climate change, energy transition and infrastructure; peace and security; private sector and economic integration; education, mobility, and migration; agriculture and sustainable development; and health systems and vaccine production. Among the main announcements were:

- An investment package of €150 billion to help build more diversified, inclusive, sustainable and resilient economies around core areas of the Global Gateway Initiative.
- An EU pledge to provide 450 million Covid-19 vaccine doses to African countries in coordination with the Africa Vaccine Acquisition Task Team (AVATT) platform, by mid-2022, and to provide support to the African CDC to ramp up the pace of vaccination.
- Further action on debt relief and liquidity support beyond the Debt Service Suspension Initiative to fight the pandemic-induced recession including through the new allocation of IMF special drawing rights (SDRs).

However, what has become clear is that the renewal of the Atlantic Alliance under the Biden administration includes an allied effort to counter China's dominant role in infrastructure investment and delivery in the developing world. Hence,

> the EU is committed to working with like-minded partners to promote sustainable connectivity investments. Global Gateway and the US initiative Build Back Better World will mutually reinforce each other. This commitment to working together was reaffirmed at COP26 … where the EU and the United States brought together like-minded partners to express their shared commitment to addressing the climate crisis through infrastructure development that is clean, resilient, and consistent with a net-zero future. (European Commission 2021c)

Assessing the EU–Africa trade arrangements

The three main policy initiatives that have framed the EU's engagement with Africa since 2021 made important new commitments to a green transition, sustainable value chains, industrial development, and soft and hard infrastructure. These commitments in the Open, Sustainable and Assertive Trade Policy, in the Africa Protocol of the PCA, and in the Global Gateway are staples in the diet of African aspirations, as can be found in manifestoes such as Agenda 2063: The Africa We Want (AU Commission 2015). What is missing from EU policy are the trade arrangements that are essential to deliver the desired outcomes.

In the multiple trade regimes that are in place, the EU and (most) African countries have established a structured framework for their trade relations. However, the EU trade arrangements are neither efficient nor appropriate from a development perspective. The effect of the EU's varying trade regimes is a fragmentation of African markets, with gaps in coverage and hard borders for EU trade between African countries within the same customs union. This is the case, for example, in the Economic Community of West African States (ECOWAS), which has achieved the status of a customs union, with its 15 member states implementing a common external trade regime. Côte d'Ivoire and Ghana concluded separate interim EPAs with the EU, thereby undermining ECOWAS's, and indirectly the continent's, integration programme.

Similarly in the case of the South African Development Community (SADC), the EPA group within this REC contains only seven of the 16 SADC member states that are implementing an EPA. The different rules of origin that apply to the different trade regimes do not help to foster integrated supply chains between countries. On top of this, the EU has begun to move forward into deepening its reciprocal trade regimes with the North African and EPA countries to encompass services, intellectual property rights and government procurement. The risk is that, if care is not taken, this will deepen divisions between trade regimes among African countries, making African trade policy harmonisation even more difficult (Luke, Mevel and Desta 2020; Luke, Mevel and Desta 2021; Luke and Suominen 2019).

This matters because, as demonstrated in Chapter 1, intra-African trade, although accounting for only a small share of Africa's total trade, is more diversified and with higher value-added content than Africa's exports to the EU and other trading partners outside the continent. It follows that, as a matter of sequencing, the harmonisation of trade rules between African countries must first be achieved to underpin intra-African trade with predictability and certainty and to incentivise trade growth and smoother trade flows. This is indeed the rationale of the AfCFTA, which aims to create a preferential trade area throughout the African continent.

The Africa Protocol of the PCA makes the claim that the EU's trade arrangements with African countries are 'complementary and mutually supportive' and contribute to the 'deepening of the regional and continental integration process as part of the AU's trade and structural transformation agenda'. The empirical evidence does not support this. Analysis by the Economic Commission for Africa (ECA) based on economic modelling for trade in goods found that implementation of the EU reciprocal agreements ahead of the AfCFTA would result in losses in trade – or trade diversion – between

African countries. On the other hand, if the AfCFTA were fully implemented before the reciprocal agreements, this negative impact would be mitigated. Trade gains by both African countries and the EU would be preserved while intra-African trade would expand, significantly benefitting trade in industrial goods. This points to the need for a strategic sequencing of trade policy, prioritising the AfCFTA first (Mevel et al. 2015).

The 2021 ECA modelling results, which took liberalisation of trade in goods and services along with reduction of non-tariff measures into account, further affirms the need for correct sequencing. This study found that the share of intra-African trade would nearly double following the AfCFTA reforms. Most of the gains will accrue to the industrial and agri-food sectors as well as services, which are critical for Africa's transformation (UNECA 2021). As such, AfCFTA implementation should be prioritised over reciprocal trade deals with third parties. In time, this approach will ensure substantial benefits for both Africa and its advanced country partners. The challenge for Africa is to find an alternative pathway that better aligns incentives and sequences trade openings with the EU and other advanced partners. Two considerations should illuminate any such pathway.

First, as shown in Chapter 1, the EU's trade relationship with Africa is highly asymmetrical. The EU accounts for a much larger share of Africa's exports than Africa represents in the EU's exports, but Africa's exports to the EU are overly concentrated in fuels and metals. For a transitional period benchmarked against milestones in AfCFTA implementation and the gains emerging from it, a good development case can be made for unilateral market access that is duty-free and quota-free to all African countries, with cumulative rules of origin regime. This will require multilateral legitimisation through a new WTO waiver. One element in overcoming the current paralysis at the WTO, which is discussed in Chapter 5, must be recognition that its 'one size fits all' rules require reimagination to meet the 21st-century realities and challenges facing late developers, such as African countries. Given the weight of the combined number of EU and African members of the WTO, and the precedent established by the US's African Growth and Opportunity Act (AGOA), which provides sub-Saharan African countries with duty-free access to the US market (discussed in Chapter 4), securing a waiver should not be an insurmountable feat. In AGOA, the United States, in contrast to the EU, applies a uniform preferential trade regime for all sub-Saharan countries that meet the eligibility criteria. However, the US approach also maintains different trade arrangements with North African countries.

Concessions to Africa, as the world's least-developed continent, that allow non-reciprocal access to the EU and other advanced country markets for a fixed transitional period are strongly pro-development. They incentivise African countries to seek trade opportunities with each other and mitigate the risks of trade diversion. By ensuring the right sequencing for the AfCFTA, this will also help Africa to build productive capacities and achieve its potential for strong and diverse growth in intra-African trade with inclusive and transformational consequences. African integration is in the interest of the EU and the rest of the world. Reduced non-tariff barriers, lower intra-African tariffs, improved trade facilitation, and integrated markets create a large, prosperous, peaceful and more dynamic environment for trade and investment opportunities for Africa's partners as well as for African own enterprises to grow.

At the European Parliament, if not at the Commission, there is strong support for a radical change in EU trade policy towards Africa, as a resolution adopted by the Parliament in June 2022 made clear:

> Members believe that the EU needs a whole new basis for its economic partnership with Africa, based on a level playing field, equality, mutual respect and understanding. This is a unique opportunity to re-launch trade relations between the two continents, to engage in a renewed, mutually beneficial and sustainable partnership based on solidarity and cooperation, and to reshape economic and trade relations with a view to empowering Africa. (European Parliament 2022)

In relation to the framework for trade policy analysis outlined in Chapter 1, plurality in European politics and society is reflected in the efforts of the EU Commission to engage its European constituencies at various stages of the policy process. The Open, Sustainable and Assertive Trade Policy, for example, is based on extensive intra-European consultation. Under the EU institutional arrangements, the Commission has executive responsibility for trade policy, which provides a basis for active engagement and enables it to take a strategic view of European interests. With far more resources, the EU Commission is better equipped not only to leverage linkages between development finance, investment and trade but also to set and shape the agenda and outcomes. On the African side, notwithstanding AU strictures to 'to engage external partners as one … speaking with one voice' (AU Commission 2018), the AU Commission has no mandate to act on behalf of member states in trade negotiations. Ad hoc arrangements are put in place to coordinate negotiations. This leaves the African countries vulnerable to being outmanoeuvred in trade negotiations and more broadly in engagement with its partners. The same vulnerability is inherent in Africa's trade relations with China.

3.2 Africa–China trade

China's economic activities in Africa covering trade, investment, infrastructure, construction, manufacturing, and development finance have expanded rapidly over the last two decades. Unlike the EU, which since the 1960s has established an explicit policy structure for its trade relations, or the US's Africa Growth and Opportunity Act (AGOA), only the most basic policy framework is in place for facilitating trade and investment flows between China and African countries. This is not withstanding the rapid trade growth that has seen China rise to become Africa's second most important trade partner after the EU, as shown in Chapter 1.

On the African side, trade policy interest has centred mainly in trade promotion and access to technology for boosting productive capacities. This includes clarification of sanitary and phytosanitary (SPS) regulations, the setting up of 'green lanes' to fast-track agricultural exports to China, and emerging e-commerce initiatives, along with securing access to China's technological know-how in sectors such as transport, energy and telecommunications. On China's side, its trade interests follow the well-established pattern of engagement through an overwhelming concentration on natural resource imports from Africa (see Chapter 1) and export of manufactures. But Chinese financing and response to demand for infrastructure development support, along with investment in manufacturing, have been a prominent part of the relationship, which other partners are almost enviously trying to emulate. As a 'late developer' itself, there is understandable appreciation in China of the contribution that good infrastructure and affordable energy can make to competitiveness and industrial development. Forty-three African countries signed up to China's flagship trillion-dollar Belt and Road Initiative (BRI).

China–Africa trade relations is the focus of this section, with issues such as finance and manufacturing only touched upon as part of framing the highlights of the trade relationship. It is a relationship that has evolved from what may be described as 'speed dating' to a 'steady courtship'. This is the result of both China's reassessment of its global economic strategy and African countries' awakening to the geopolitical stakes at play in their relationship with China.

From speed dating to a steady courtship

After three decades of China's *zǒuchūqū* 'Go Out' policy, Chinese president Xi Jinping in 2021 unveiled a 'dual circulation' strategy that pledges to reduce overseas capital outflows and rebalance growth towards domestic consumption (PRC 2021). This is a response to slower growth in the Chinese economy and an effort to 'level up' against burgeoning inequalities. The new approach translates into reduced development financial flows from China to Africa (see Table 3.1), compounded by mounting African debt and growing concerns over debt servicing.

At the Eighth Forum for China–Africa Cooperation (FOFAC-8), China announced a US$20 billion reduction in nominal terms of its Africa financial envelope. This was preceded by dampening enthusiasm for project financing by China's largest policy banks, China Exim Bank, and the China Development Bank, which sharply reduced global lending from $75 billion in 2016 to just $4 billion in 2020 (Olander 2020). Official policy for the foreseeable future is a deepening and intensification of private sector investment with

Table 3.1: China's financing commitments (loans and grants) announced at the Forum for China–Africa Cooperation (FOCAC), 2006–2021

Date	Amount (US $ billions)
2006	5
2009	10
2012	20
2015	35
2018	60
2021	40

Source: Authors' compilation based on FOCAC (n.d.).

targeted support to smaller and medium-scale projects as opposed to large-scale infrastructure deals (PRC 2021). It is not clear how the new approach will impact the ambitious BRI (Box 3.2).

As China restructures its financial engagement, its relationship with Africa appears to be maturing into a steady courtship from the hot flush of speed dating. Meanwhile, the US, EU, Japan and other OECD countries that failed to keep up with Chinese development financing and infrastructure investments in Africa announced new programmes such as the EU's Global Gateway Initiative and the US's 'Build Back Better World' (B3W) initiatives. These initiatives are aimed at ensuring that China's courtship is not exclusive since decoupling between Africa and China is not a realistic proposition (Yu 2022).

However, Beijing's shift from lavishing African countries with state-backed capital has potentially opened policy space for trade promotion and support for utilising Chinese market access provisions to boost exports into China, as announced at FOCAC-8 in 2021. Trade promotion featured heavily in President Xi's opening speech at FOCAC-8. In a bid to reach a declared target of $300 billion in non-oil imports from Africa by 2024, the president announced the introduction of 'green lanes' for African agricultural exports to China, more efficient inspection and quarantine procedures, and expansion of the scope of products enjoying zero-tariff treatment for the least-developed countries (LDCs) under the duty-free, quota-free (DFQF) scheme. It remains to be seen whether these measures will be sufficient to triple China's imports from Africa within three years to reach the target.

Trade policy arrangements

> When we talk about China-Africa trade, we need to emphasise how insignificant Africa is to China in strictly numerical value. (Olander 2021)

Box 3.2: The Belt and Road Initiative: vested interests and African incentives

There is a clear plan on the Chinese side and every policy and investment decision China makes towards the African continent is geared to the pursuit of Chinese interests … Do African policymakers recognise and have a response to this (not necessarily bad policy shift)? There is no Chinese actor in Africa that is there for altruistic reasons, there are always vested interests. (Moore 2021)

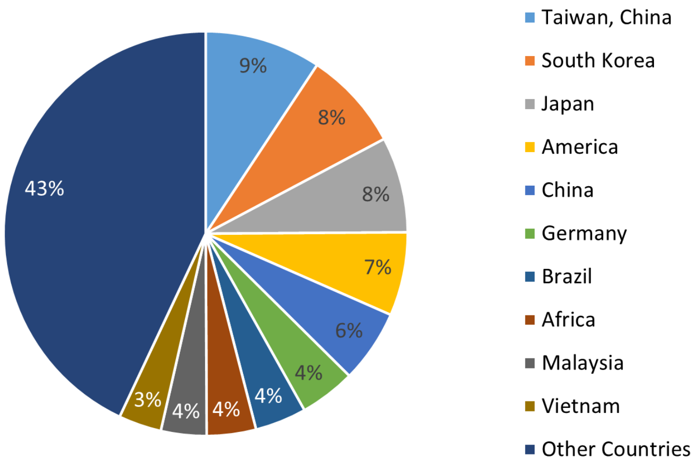
It is never about what China wants to do, it is about what Africa wants to do. (Foreign Minister Wang, 2021)

The Belt and Road Initiative (BRI) is not a foreign aid project but rather a Chinese economic and strategic project to help secure trade, investment opportunities and natural resources for Chinese domestic enterprises 'with the assumption that closer economic ties spill over to closer strategic ties'. (Hwang 2021)

China trades more with countries in Asia ($3.06 trillion) than anywhere else in the world. Asia accounts for more than half of China's total trade. Africa's share of China's $6 trillion global trade in 2021 was only 4 per cent, according to China Customs Administration data (Olander 2022; see Figure 3.2). China satisfies its appetite for commodities through imports from across the world – not just Africa. Except for a handful of select commodities with strategic importance for the digital and green economy, such as cobalt and manganese, that are in high demand for Chinese manufacturing, it does not rely on Africa's natural resources as a single supply source for its industry. However, nearly all of China's imports of cobalt and manganese are from Africa.

While commodity trade remains dominant, a subset of China's trade relations with Africa is Chinese investment in manufacturing in several countries mainly driven by relatively lower labour costs (Calabrese, Huang and Nadin 2021; Oya 2021). Some investments in the manufacturing sector have been criticised for their trade diversion, value capture and opportunistic use of preferential agreements such as AGOA and EBAs, as opposed to contributing to industrial upgrading and domestic value addition for African firms and enterprises (Calabrese and Tang 2020). But the picture is more complex: not all Chinese 'geese' are seeking new locations in Africa for production as part of global networks and value chains. Some firms in the flock are local market-seeking geese producing specifically for the regional market and

Figure 3.2: Top 10 countries and regions in China's imports (percentage share), 2021



Source: Authors' calculations based on China Customs Administration (2021).

following a mass-customisation approach to reach African consumers. For example, smartphones produced and sold by the Chinese manufacturer Transsion Holdings account for the largest market share in Africa. Others are raw material-seeking geese, or small geese creating cluster investments. However, the flock offers a range of development opportunities and challenges for economic transformation in Africa (Bräutigam, Xiaoyang and Xia 2018, p.3; Bräutigam, 2021).

The Chinese market is national, but its provincial expression and the provincial level opportunities do not yet appear to be fully understood by African policymakers. For example, Zhejiang, a coastal province, which is home to the port of Yiwu, is one of the major distribution hubs for commodities in the world and the second largest port for African goods. When the provincial governor of Zhejiang embarked on a tour of three African countries, policymakers overlooked the importance of the visit, although Zhejiang's GDP approaches half of that of the entire African continent and is home to Alibaba, the financial and e-commerce conglomerate (Olander 2021). On the other hand, Hunan, a central Chinese province, provided the destination of a large red chilli pepper import deal signed with Rwanda (Olander 2021).

> No matter what happens in the announcements of trading arrangements and the opening up of market access through tariff free agreements … not many African countries are in a position to take advantage of these arrangements. (Oya 2021)

Table 3.2: Summary of key China–Africa trade policy measures

Duty Free Quota Free (DFQF) scheme	• Commenced in 2010 and renewed in 2015 • Covers 97 per cent of tariff lines • 33 African LDCs are eligible under the scheme
Sanitary and phytosanitary measures (SPS) and product specific standards	• 11 African countries have signed SPS agreements with China, starting from 1998 onwards
E-commerce initiatives	• The Silk Road E-commerce initiative • Two African member states are operating on Alibaba Electronic World Trade platform: Ethiopia and Rwanda
China's economic and trade cooperation zones in Africa (ETCZs)	• Five (out of 20 planned) national level ETCZs confirmed: the China–Egypt TEDA Suez; the China–Ethiopia Eastern Industry Zone; the Nigeria Lekki Free Zone; China-Tanzania ETCZ; and Zambia–China ETCZ
Free Trade Areas (FTAs)	• Mauritius-China FTA operational as of 2021
'Green Lanes' scheme	• Established in 2021 at FOCAC-8 to speed up the inspection and quarantine procedure for African agricultural exports to China. • Expected to help reach $300 billion in total imports from Africa in the next three years.

Source: Authors' elaboration.

African countries are generally in the initial trade policy design stage, with a focus on clarifying basic regulatory issues such as SPS, 'green lane' schemes to speed up inspection and quarantine processes for African produce, e-commerce transactions and the establishment and operation of SEZs (see Table 3.2).

As previously noted, only the most basic framework is in place for trade engagement between Africa and China. These are, first, the obligatory WTO most favoured nation (MFN) privileges that cover both China and African countries that are WTO members. Second are the concessional arrangements for the least-developed countries through the duty-free, quota-free (DFQF) initiative for these countries. Third is a free trade area agreement signed in 2021 between China and Mauritius. Since it considers itself a developing country, China does not offer a GSP preferential trade scheme to the African countries that are not classified by the UN as least developed. Indeed, until 2014, China itself was a beneficiary of the GSP schemes offered by several OECD countries. Today, New Zealand, Australia and Norway still grant China GSP status (Huld 2021).

AFRICA'S TRADE ARRANGEMENTS WITH THE EUROPEAN UNION AND CHINA 69

China's SPS rules have been a thorny issue in its trade relationship with Africa. Although Chinese SPS requirements are implemented in line with WTO approved SPS protocols, many African exporters lack the capacity to meet additional measures required by Chinese importers and formalised in Chinese customs processes (Anam 2021; see Box 3.3). This has proved to be such an irritation on the African side that President Xi was forced to address it at the 2021 FOFAC. Some African countries have SPS arrangements with China to export fresh agricultural products. Since 1998, 11 African countries have signed such agreements (Development Reimagined 2021a).

The Duty-Free Quota-Free (DFQF) scheme for 33 African LDCs[1] with diplomatic relations with China was established in 2010 (UNCTAD 2012). It covers up to 97 per cent of tariff lines with rules of origin that require regional value cumulation of no less than 40 per cent (UNCTAD 2016). Since China has no preferential scheme for non-LDCs, meeting the RVC requirement presents a challenge for supply chains that connect African LDCs and non-LDCs. Another issue is that the same product from an African LDC and non-LDC may face different tariffs. For example, there is a 10 per cent duty on floriculture, horticulture and other agricultural produce from Kenya, making them more expensive and less competitive than the same products exported by neighbouring Ethiopia, which qualifies for duty-free status (Olander 2021).

For developing African countries, such as Nigeria, Kenya, Egypt and South Africa, which do not qualify for the DFQF scheme and do not have an FTA with China as Mauritius does, there are no trade concessions. What China has offered to them is improvements to its importing process through 'green lanes', but not preferential treatment. This is in sharp contrast to the preferential

Box 3.3: Kenya freezes up over avocado exports

In 2020, Kenya signed an SPS+ product-specific standard arrangement with China for avocado exports. The conditionalities include product sizing, freezing, and container shipping. Only 10 out of 100 export farms were allowed into the Chinese avocado market as exporters faced challenges in cold chain infrastructure. Kenya was only able to ship a single 20-foot container of ripe frozen avocadoes. Other developing countries like Vietnam export almost five million tonnes of avocadoes to China per year. During Foreign Minister Wang Yi's visit to Kenya in 2021, six MoUs were signed, including one that streamlines the export requirements to allow fresh avocadoes to enter China.

Sources: Anam (2021); Olander (2021).

schemes offered to African countries by the US, the EU, the UK, Canada and other OECD countries, which tend to include at least some offerings for both developing and least-developed African countries. On the other hand, not only do Asian LDCs benefit from China's DFQF scheme but almost all Asian non-LDCs have preferential access to the Chinese market.

In 2021, Mauritius signed an FTA with China. It is a reciprocal agreement that will cover 96 per cent of traded items when fully phased in. However, Mauritius already maintains a highly liberalised trade regime, with zero tariffs on almost all products (Ancharaz and Nathoo 2022). The agreement includes provisions to promote the development of a renminbi clearing and settlement facility in Mauritius, expand Mauritius's high-tech industries and financial services, and protect its fisheries. Crucially, it positions Mauritius as a future 'offshore' location for Chinese investments and firms interested in the African continent. Rules of origin exclude products that contain non-originating Mauritian materials that exceed 10 per cent. This is more restrictive than what is offered by the US under AGOA and its accommodative third-country fabric provision, which is of significant benefit to Mauritius's clothing and textile industry (Development Reimagined 2021a). Mauritius's liberalised trade regime is unlike most African countries. Others typically protect large sectors of their economy and demand long transition periods for trade liberalisation in agreements with partners, such as is the case with the EU and UK economic partnership agreements. The Mauritius example of an FTA with China is therefore not likely to be widely followed by other African countries.

What next for China–Africa trade

China's dual circulation policy to reduce capital outflows and rebalance growth towards domestic consumption, while also pursuing its geostrategic BRI objectives (PRC 2021), may appear contradictory (Garcia-Herrero 2021). But China will surely balance these imperatives while also dealing with immediate pressures including continuing to manage Covid-19, a construction sector bubble, global inflation, and the fallout from the Ukraine war. It is also well known that China's long-standing ambition is to achieve self-reliance in key high-technology sectors such as semiconductors and artificial intelligence and in more basic sectors like food and energy.

As the world's second largest economy, China remains an important trade and investment partner for Africa. A key outcome of the 2021 FOFAC was China's commitment to simplify customs processes for African agricultural exports. Although China is cutting back on financial commitments, its $200 billion investment in infrastructure projects in Africa between 2016 and 2020 (PRC 2021) is drawing in ambitious investment plans by other partners. Even where Chinese financing arrangements remain dubious and controversy lingers over the quality of some projects, connectivity across

Africa is improving, with significant spillovers for boosting trade (Fu and Eguegu 2021). Similarly, China's foray into manufacturing and the introduction of special economic zones (SEZs) in Africa exposed the diversity of 'geese' in its flock but also validated the central role of industrial development in economic transformation. Over 20 China-supported SEZs that provide infrastructure and logistical support for manufacturing are in operation or planned in almost as many African countries. Production in these SEZs is also aimed at the continent-wide market that is being created under the AfCFTA. The ubiquitous spread of China's digital hard- and software is unlocking new opportunities for e-commerce across sectors.

However, China's trade offer to Africa falls below expectations. While there is increasing uptake by African LDCs of China's DFQF market access, China is alone among the leading economies in not offering a generalised system of preferences or a comparable programme such as the US's AGOA (US–Africa trade is discussed and assessed in Chapter 4). This is an anomaly that needs to be fixed. It also highlights the need for coordination and prioritisation among African countries in dealing with China. To date, no African country has published a China strategy. There is more coherence in the Chinese approach towards African countries than there is within the African Union on China (Anam and Ryder 2021; Lisk 2017; Soulé 2021). Though there has been an African Union Office in China since 2018, and a long-standing and active African Ambassadors Group in Beijing, with 51 representatives out of 55 AU members, there remains little evidence of strategic coordination.

As China's relationship with Africa settles into a mature courtship, along with the withdrawal of the former's 'going out' policy and rebalancing of its priorities and interests, there is scope for African countries to ramp up their collaboration as China's preferred modality appears to be bilateral engagement with individual African countries (Mboya 2021). An AGOA-style preferential programme should be a key priority. This matters in the face of the competition Africa faces in the Chinese market from Asian countries that have better market access arrangements with China. The ambition announced at the 2021 FOFAC by President Xi to triple African non-oil exports to China within three years by 2024 provides a basis for coordinated initiatives on the African side to establish modalities for achieving this target. If achieved, the target will provide a major boost not only for Africa's exports to China but also for intra-African supply and value chains. The potential spillover for intra-African trade will require China to put a preferential scheme in place for Africa's non-LDCs to complement the DFQF scheme for African LDCs. As a collective forum that meets periodically, FOCAC does not itself provide an institutional framework for follow up and monitoring its outcomes. However, a coordinated approach on the African side to overcome the bottlenecks for exporting successfully to China is more likely to achieve the benefits of increased trade with China.

In relation to the framework for trade policy analysis outlined in Chapter 1, only relatively low grades can be given for openness and transparency, inclusive participation, and accountability since these have not been given much consideration on either side of the China–Africa trade relationship. Slightly higher grades can be given for efficiency and appropriateness in the light of China's response to African pressure to streamline customs procedures for imports from Africa. China's support for building manufacturing capacity and infrastructure development also deserves credit, although the evidence on development impact is mixed.

Summary

In reviewing and assessing Africa–EU and Africa–China trade arrangements, we can conclude that the trade offers of these partners fall short of Africa's development needs. If the EU has been zealous in devising multiple trade regimes for Africa, China on the other hand offers only a basic policy framework for guiding its trade with Africa. The harmonisation of trade rules between African countries is the rationale of the AfCFTA. This incentivises African countries to seek trade opportunities with each other across the continent and derive benefits from economies of scale. By ensuring the right sequencing for the AfCFTA to be implemented before Africa enters reciprocal trade deals, the risk of trade diversion is mitigated. Empirical evidence from economic modelling suggests that trade gains with advanced partners such as the EU and China would be preserved, while intra-African trade would expand significantly benefitting trade in industrial goods. This will help Africa to achieve its potential for strong and diversified growth in intra-African trade. With all but one AU member state to date, signatories to the AfCFTA, a trade offer to all AfCFTA parties by the EU and China that is modelled after the positive elements of the US's AGOA, such as non-reciprocity and uniformity, will overcome the divisions associated with the EU trade arrangements and enable China to extend preferential market access to African countries that are not LDCs. As was the case with AGOA, WTO backing can be sought for such an offer from the EU and China as a concession to the world's least-developed continent.

Note

[1] The countries currently covered by the scheme in Africa are the 33 LDCs in Africa – namely: Angola, Benin, Burundi, Burkina Faso, Central African Republic, Chad, Comoros, the Democratic Republic of the Congo, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Somalia, South Sudan, Sudan, Tanzania, Togo, Uganda and Zambia.

Annex 1: List of key informants interviewed (KIIs)

Name	Organisation	Position
Carlos Oya	School of Oriental and African Studies (SOAS)	Professor of political economy of development; director of research, SOAS China Institute
Shirley Yu	London School of Economics and Political Science (LSE)	Director of the China-Africa Initiative at the LSE Firoz Lalji Institute
Patrick Anam	Development Reimagined	Trade policy analyst and consultant
Eric Olander	The China Africa Project (CAP)	Co-founder
Geoffrey Osoro	East African Community	Trade policy adviser
Gyude Moore	Center for Global Development	Senior policy fellow
Anzetse Were	Financial Sector Deepening Africa (FSD Africa)	Economist
Oluwatosin Adeshokan		Economist and journalist

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